

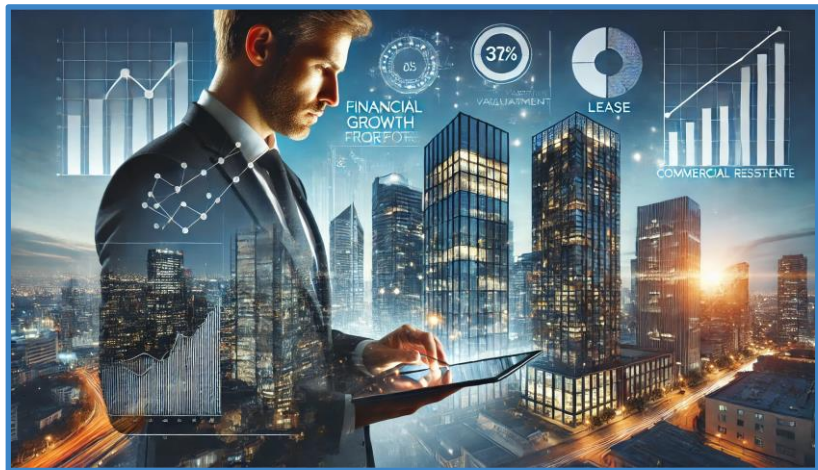
From Complexity to Clarity:

A journey to AI-Driven Real Estate insights

Project Overview

For a commercial real estate fund managing a diverse portfolio, the foundation of every critical decision is data.

A leading \$100M commercial real estate fund, Global Fintech Pvt Ltd, operates across Western India, managing asset buy/sell cycles, multi-million dollar loans, and tenant receivables spanning dozens of properties.



Until recently, the firm's core processes ran on disconnected spreadsheets and varied documentations, leaving management waiting days for insights and exposing decision-makers to personnel and operational risk.

Client Context & Objectives

Global Fintech manages a dynamic asset portfolio with complex stakeholder needs: property acquisition, lease administration, loan servicing, and real-time asset valuation—all handled across manual, siloed files. Their leadership wanted to:

- Reduce the firm's reliance on "single-person intelligence" for portfolio data access.
- Create audit-ready, secure, and centralized dashboards.
- Accelerate their ability to spot market opportunities and risks, enabling rapid, informed decisions.

The Challenge

Critical business intelligence lived in shared folders, vulnerable to personnel changes and errors. Asset management and loan oversight depended on individual knowledge, with no backup or governance. Data was fragmented, security controls were absent, and business insights required up

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to 48 hours to compile—with leadership unable to answer spontaneous portfolio questions or adapt to market shifts in real time.

Critical issues identified included:

- **Delayed Insights:** Simple data requests took up to 48 hours to process, making it impossible for leadership to make timely, proactive decisions.
- **Personnel Risk:** The company was over-reliant on a few key individuals who held all the operational knowledge, with no backup or governance in place.
- **Lack of Future-Proofing:** Without a centralized data source, the firm could not easily conduct "what-if" scenario analysis or correlate their holdings with dynamic market changes.
- **Data Integrity & Security:** With no access restrictions on shared files, there was no clear audit trail, raising concerns about data integrity and security.

“Technology with Intent means starting with the problem, not the product.”

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Our Approach: Partnership Over Platform

Rushmore Advisors applied its **NAVIS™ framework** —a method designed to clarify near-term priorities and map long-term operational goals. Listening deeply to the client’s risk anxieties, Rushmore Advisors avoided “one-size-fits-all” enterprise BI platforms common from big consulting firms.



This often leads to a steep learning curve, low adoption rates, and a quick return to old, inefficient methods. Our philosophy is to act as an on-your-side partner, ensuring the technology serves the business, not the other way around. Instead, the Rushmore Advisors team focused on creating a solution rooted in usability, rapid onboarding, and measurable business value.

We began with **North Star Alignment**, working closely with the client to understand their core pain points, immediate personnel risks, and long-term strategic goals.

The client's concern wasn't just about a tool; it was about creating a sustainable solution that their team would actually use and that would future-proof their business.

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The Solution: EurekaAI Centralized Dashboard

We implemented **EurekaAI**, a conversational AI-powered BI tool designed to centralize and transform the client's disparate data sources into a single, intelligent insights engine. Our data management team worked with the client to structure and organize their data from multiple sources, including Excel and APIs, for consumption by the AI engine. The platform's core features included:

- A **unified dashboard** that provides a single, real-time view of the entire real estate portfolio, including assets, loans, tenants, and lease agreements.
- **Conversational analytics** that allow the client to "talk to their data" by asking questions in plain English, receiving real-time insights without needing to build a new report every time.
- Rushmore Advisors built a **custom REACT input portal** to track every operational transaction: purchases, leases, loan events, and tenant changes, with full audit logging and user accounts to secure data and establish process discipline.

The Outcomes

By implementing a solution that prioritized clarity and practicality, Rushmore Advisors delivered outcomes that were not just about technology—they were about tangible business impact. The client now has the data-driven capabilities of a large enterprise without the overhead or complexity. This project demonstrates our core pillar of **Measurable ROI**.

- **Near-Instant Insights:** The time to generate a critical business insight was reduced from **48 hours to seconds**, enabling proactive, data-driven decisions.
- **A Single Source of Truth:** Global Fintech's leadership accesses a single, always-current dashboard spanning assets, loans, and receivables.
- **Operational Risk Slashed:** Discrepancies and outliers are



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now flagged automatically in weekly reports, eliminating waiting periods and single-person bottlenecks.

- **Future-Proof Scalability:** The platform is easily scalable across the entire portfolio and is simple enough for the operations team to use, ensuring data integrity and security are maintained as the business grows.

Lessons & Forward Motion

Global Fintech now owns an adaptive, future-ready data platform. The firm moved from reactive reporting to proactive management, empowering teams to get answers and act swiftly. This positions them for strategic growth, better asset opportunities, and resilience against operational risks.

Take the Next Step

Explore how Rushmore Advisors can build a tailored AI insights engine to transform your data into decisive action. [Book your strategy session today].

